



## Choice Training 8-6: Application Verification & Submission

### Process

## 1. 6 Application Verifications and Submission

### 1.1 Training 8-6:



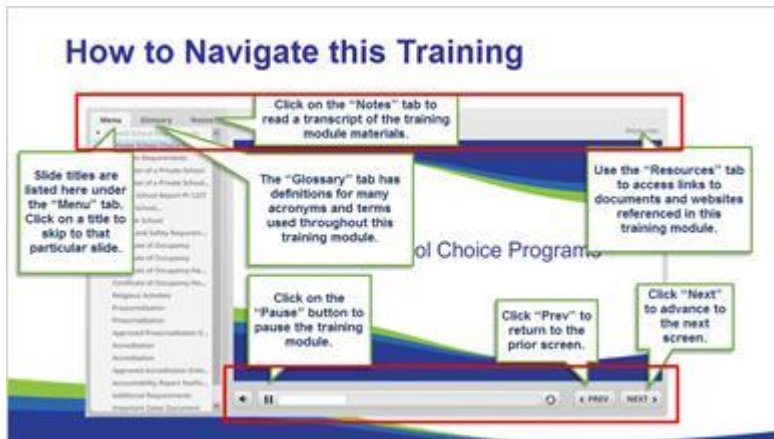
#### Notes:

Welcome to the Wisconsin Department of Public Instruction's training module on the Private School Choice Programs. We will refer to the Private School Choice Programs as "Choice" or "Choice program" throughout this training. The Choice program is governed by Wis. Stat. § 119.23 and 118.60, as well as Wis. Admin. Codes PI 35 and 48. Provisions of this training module are subject to statutory and rule changes.

This training module will give an overview of the application verification & submission process that the school completes in the Online Application System, or OAS.



## 8-6.2 How to Navigate this Training Module



### Notes:

Before we start, here are some tips and tools you may wish to use when viewing this training.

When listening to this training please note the buttons at the top of the training screen. Titles to all of the slides in this training are listed under the “Menu” tab on the top left of the training screen. You may watch the training in its entirety, or you may skip to a specific slide by clicking on the title of a particular slide.

Acronyms and terms that are used throughout this training are defined under the “Glossary” tab on the upper left side of the training screen. If you have any questions about a particular acronym or term that is used in this training, click on the “Glossary” tab to read the definition of that acronym or term.

The “Notes” tab has a transcript of the training materials as they are presented. If you wish to read along with the training, please click the “Notes” tab on the upper left side of the training screen.

We have also posted resources related to this training which can be found under the “Resources” link on the upper right hand side of the training screen.

Next please note the buttons at the bottom of the training screen. If you want to pause on or during a specific slide, please hit the “Pause” button. Clicking the “Prev” button will allow you to return to the previous slide and clicking the “Next” button will allow you to advance to the next slide, if you wish to advance sooner than the auto-timing.



### 8-6.3 Logging in to OAS

**Logging in to OAS**

•Log in using your username and password issued by the DPI

#### Notes:

The application verifications are completed in OAS. Users must log in using their username and password issued by the DPI.

### 8-6.4 Home Page-Application Summary

**Home Page-Application Summary**

**Private School Choice Programs**

**Application Summary**

School Year: 2015-2016  
 School Name: [Search]  
 Address: [Search]  
 Administrator: [Search]  
 Program: [Search]

Student Name: [Search]

Search [X] [Reset]

Results: 100 Results, 10 Results, 1 Results

Display: [Grid] [List] [Table]

Columns: [Add] [Remove] [Reset]

App #	App Name	App Type	App Status	App Date	App Location	App Contact	App Email	App Phone	App Fax	App Address	App City	App State	App Zip
318721	James, Mary	Private	Verified	02/25/2015	Dec	James, Mary	318721	318721	318721	318721	318721	WI	53102
318722	James, Mary II	Private	Not Yet Verified	02/25/2015	Dec	James, Mary	318722	318722	318722	318722	318722	WI	53102
318723	James, Carlisle	Private	Submitted	02/25/2015	Dec	James, Carlisle	318723	318723	318723	318723	318723	WI	53102
318724	James, John	Private	Verified	02/25/2015	Dec	James, John	318724	318724	318724	318724	318724	WI	53102
318725	John, Isabella	Private	Verified	02/25/2015	Dec	John, Isabella	318725	318725	318725	318725	318725	WI	53102

#### Notes:

The first screen when you log in will be the Application Summary screen. The



Application Summary in OAS will list all applications that have been submitted to the school through the online parent application for the program that the user is logged in for. The online parent application must be completed by the parent or a legal guardian. We will use the term “parent” throughout this training to refer to either the parent or legal guardian.

The school has the ability to filter the applications by the enrollment period, grade, and status of the application.

The school may also filter for continuing students and the income method used by checking continuing, New-DPI Method, New-DOR Method, or New-Foster.

Once the parent has submitted their application and the school has received the required documentation from the parent, the Choice administrator or Choice designee should verify the application in OAS. In order to begin verifying an application, click on a student’s name.

### 8-6.5 Application Verification Screen

#### Notes:

The application screen will provide the family information. All students on the application will be listed in the student summary. Students with the same status are verified on the same page. In this example, all of the new students are showing. The school will need to separately go into Small Boy’s application to separately verify his



application since he is identified as a continuing student.

If the application included any foster or kinship care students, the verification would need to be completed separately for any foster or kinship care students.

The verification screen will include an income verification section if the verification is for new students. It will include a residency verification section and a general documentation verification section for all students.

### 8-6.6 Completing DPI Income Verifications

**Completing DPI Income Verifications**

**New Students Application - Verify Income and Residency**

School Name:	Parent/Guardian Summary	Student Summary
Atlas Preparatory Academy, Inc.	Maria Gutierrez 3312 S 13th St Jose Gutierrez Milwaukee, WI 53209 Status: Married Family size: 6	Sebastian Gutierrez DOB: 05/26/2000 (new) Yessica G. Gutierrez DOB: 09/30/2009 (new)

This verification step applies to the following new students for the February enrollment period:

- Sebastian Gutierrez
- Yessica G. Gutierrez

The parent/guardian must show you the following documentation. Please review the list of documentation below and compare the amounts to the actual documents.

1. A signed copy of the 2015 joint \$140 income tax return filed by Maria Gutierrez and Jose Gutierrez, adjusted gross income should be \$5,000.00

**Income Verification:**

☐ I have reviewed the above and attest that the income documentation listed above has been provided to the school and the amounts on the documentation match the income amount(s) reported above. All income documentation verifying income eligibility is on file at the school.

Examine the income documentation and ensure that it matches what is listed on the screen. Check the income verification box to confirm you have obtained the appropriate documentation.

#### Notes:

This slide shows an example verification screen in OAS. The verification screen will first identify what income related support must be provided if the application is for a new student. The parent must provide all of the documentation on the screen. If the documentation type on the verification screen matches what is provided and the amount of income per the documentation matches, the administrator should check the income verification box. If the amount does not match but the application is still eligible based on the income limit for the family, the box can also be checked. See the DPI Income Determination Method Training for additional information on this option.

Checking this box also confirms that the school has all income documentation on file at the school.



## 8-6.7 Completing Residency Verifications

### Notes:

The administrator will need to complete the residency verification for all applications. To complete the residency verification you will need to determine all of the following:

- The residency documentation provided in on the list of acceptable documents.
- The parents' names and address on the documentation provided match the parents' names and address in OAS.
- The documentation is dated between the dates listed on the OAS screen.
- The school district identified has been verified using one of the methods permitted by DPI and the district based on the verification matches what is in OAS.

Complete the check boxes on the OAS screen to attest that the administrator has obtained the allowed residency documentation and that the address is located in the district noted in OAS.

Additional information on the residency requirements is available in the Residency Requirements Training and in the Choice Residency Documentation Bulletin. A link to the Choice Residency Documentation Bulletin is available in the Resources in the top right corner of the training screen.



## 8-6.8 Completing General Eligibility Verifications

**Completing General Eligibility Verifications**

**Documentation Verification**

☐ I have verified that all students are eligible for MWCP based upon the information provided during the open application period that the application was received.  
☐ This family is not eligible for the MWCP based upon the information provided.  
☒ The parents/guardians did not show up by the end of the open application period to provide documentation.  
☐ The parents/guardians have not yet provided all required residency and/or income documentation.

[Save](#)

[Back to Application Summary](#)

- Complete the final verification by confirming that the student(s) are eligible or are not eligible to participate in the Choice program.
- Click "Save" then click "Back to Application Summary" to begin the verification process for the next application.

### Notes:

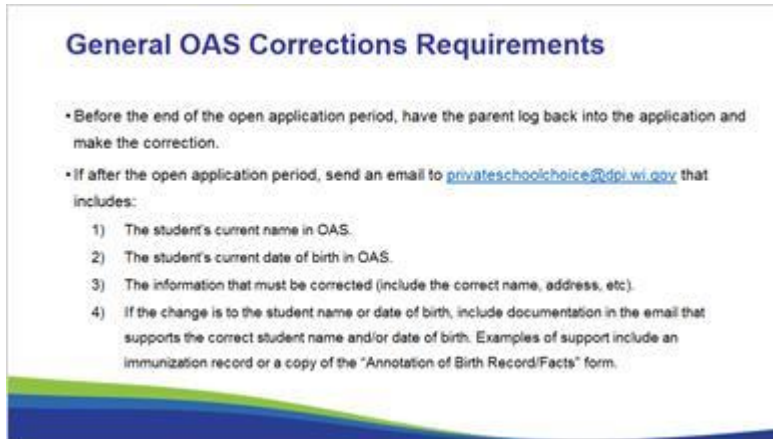
The next section of the verification screen is labeled "Documentation Verification." This is where the administrator can identify whether an application is eligible or ineligible.

If all of the required residency and income documentation has been provided and verified by the administrator, then the first radio button can be checked. If the family is not eligible, then the radio button stating that the family is not eligible should be checked. If the parents did not show up to provide documentation, then the third button should be selected. This option will not be available until after the end of the open application period in which the application is received. If the parents have not yet provided all of the required residency and/or income documentation, then the final radio button should be selected. This can be used to track which students have not yet provided the required documentation.

Once the appropriate radio button is selected, click the Save button and then the Back to Application Summary link to begin the verification process for the next application.



### 8-6.9 General OAS Corrections Requirements



**General OAS Corrections Requirements**

- Before the end of the open application period, have the parent log back into the application and make the correction.
- If after the open application period, send an email to [privateschoolchoice@dpi.wi.gov](mailto:privateschoolchoice@dpi.wi.gov) that includes:
  - 1) The student's current name in OAS.
  - 2) The student's current date of birth in OAS.
  - 3) The information that must be corrected (include the correct name, address, etc).
  - 4) If the change is to the student name or date of birth, include documentation in the email that supports the correct student name and/or date of birth. Examples of support include an immunization record or a copy of the "Annotation of Birth Record/Facts" form.

#### Notes:

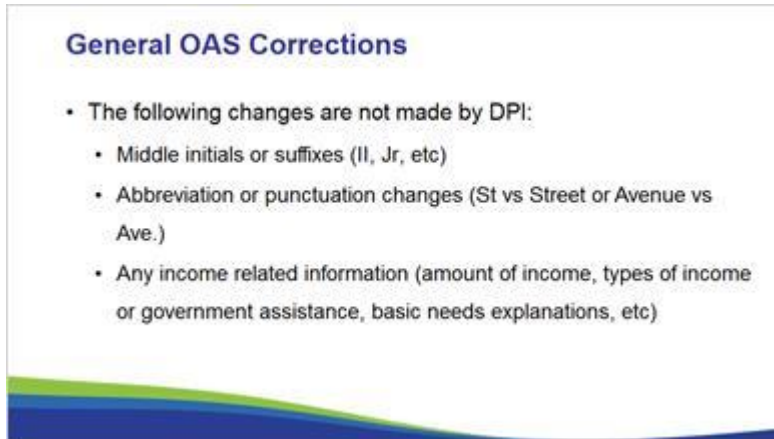
During the verification process the school may identify that information on the application must be corrected.

If it is still during the same open application period that the application was received, the school should request that the parent log back into the online parent application and make the correction.

If this is discovered after the open application period, the school can send an email to DPI using the email on the slide. The email should explain that information for a student needs to be updated in OAS. Include the student's name and DOB as currently in OAS. Then provide the information that needs to be corrected such as the student's first or last name or address. If the change is for a student name or date of birth, include documentation in the email that supports the correct student name and/or date of birth. Examples of supporting documentation for name or date of birth include an immunization record or a copy of the "Annotation of Birth Records/Facts" form. See the Student Application Processing webpage for additional information on making verification corrections. A link to this webpage is available in Resources in the top right corner of the training screen.



### **8-6.10 General OAS Corrections**



**General OAS Corrections**

- The following changes are not made by DPI:
  - Middle initials or suffixes (II, Jr, etc)
  - Abbreviation or punctuation changes (St vs Street or Avenue vs Ave.)
  - Any income related information (amount of income, types of income or government assistance, basic needs explanations, etc)

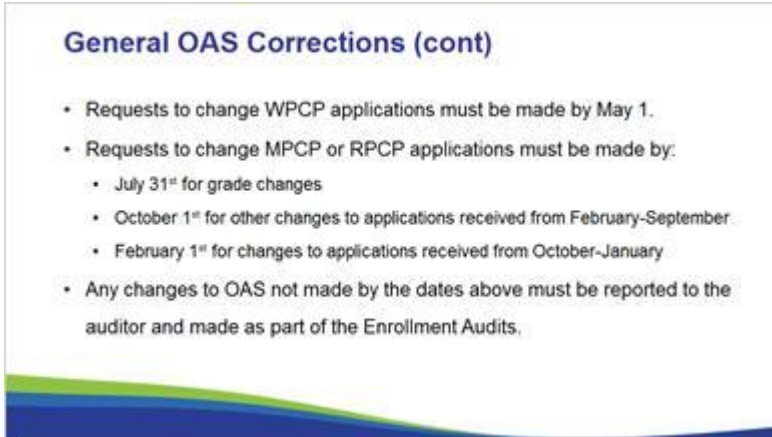
#### **Notes:**

The school does not need to review the middle initials or suffixes for the students or parents. As a result, the DPI does not make corrections for these items.

Additionally, any differences in abbreviations or punctuation between supporting residency documentation and the application in OAS do not need to be corrected in OAS. The school does not need to get any new documentation as a result of these differences. For example, if OAS has Street spelled out and the documentation has St, OAS does not need to be corrected.

Finally, any updates to income information must be made by the parent during the open application period in which the application was received. Changes to income related information are not made by the DPI. This includes changes to the amount or types of income or government assistance or the explanation of how basic needs were provided for parents who did not receive any income.

### **8-6.11 General OAS Corrections (cont)**



**General OAS Corrections (cont)**

- Requests to change WPCP applications must be made by May 1.
- Requests to change MPCP or RPCP applications must be made by:
  - July 31<sup>st</sup> for grade changes
  - October 1<sup>st</sup> for other changes to applications received from February-September
  - February 1<sup>st</sup> for changes to applications received from October-January
- Any changes to OAS not made by the dates above must be reported to the auditor and made as part of the Enrollment Audits.

#### **Notes:**

Requests for DPI to make changes to applications in OAS must be made by May 1 for WPCP. This is extremely important because DPI will complete the WPCP random selection using the information in OAS as of May 1.

Grade changes for MPCP or RPCP applications must be made by July 31. Any other change requests need to be made by October 1 for MPCP or RPCP applications received from February to September. Other change requests need to be made by February 1 for MPCP applications received from October to January.

Any changes after the dates detailed above must be reported to the auditor and made as part of the Enrollment Audits.



## 8-6.12 Application Statuses

Row	Grade	App. #	Student	Start of Birth	Status	App. #	Parent	1	2	3	4	5	6	7	8	9	10	11	12
318721	04		Allen, James	02/25/2005	Parent No Show	Dec	James, Mary	N	N	N	N	N	N	N	N	N	N	N	N
318720	04		James, Mary, II	01/13/2012	Ineligible per DOR	Dec	James, Mary	N	N	N	N	N	N	N	N	N	N	N	N
318637	02		James, Carleen	01/19/2009	Not Yet Verified	Dec	Chowdhury, John	N	N	N	N	N	N	N	N	N	N	N	N
318638	02		James, John	01/19/2009	Verified	Dec	Chowdhury, John	N	N	N	N	N	N	N	N	N	N	N	N

- **Not Yet Verified:** A parent has submitted an application to your school that is ready to be verified.
- **Parent No Show:** This option will show if the school identifies in the application verification screen that the parent did not show up by the end of the open application period with the required documentation.
- **Verified:** The parent has provided the required documentation to the school and the application has been verified by the school.
- **DOR Ineligible:** DOR determined the application was ineligible.

### Notes:

The Application Summary screen will identify the status for each application. Applications that are not verified will have a status of “Not Yet Verified.” Applications where the school identifies that the parent did not provide the required documentation by the end of the open application period will have an application status of “Parent No Show”. Applications that the school has verified in OAS will have a status of “Verified”. Applications that were found ineligible through the DOR process will have a status of “Ineligible per DOR.”

DOR ineligible means that the parent chose to use the DOR income determination method in the parent application, the school completed the DOR income eligibility determination in OAS, and DOR stated the parent did not meet the income requirements. Please be aware that the school must complete the DOR income determination in OAS. The parent or guardian identifies that they would like to use the DOR method in the online parent application.

### 8-6.13 Application Statuses (cont)

**Application Statuses (cont)**

Roll	Grade	Rolling Period	Student	Date of Birth	Status	Local ID	Parent	E	S	J	Cost	Wait	Inc
315826	08		Camacho, Tony R	11/04/2001	Ineligible in Semester 1	Feb	Camacho, Rachel A	N	N	N	N	N	DPS
315833	01		Shaw, Regina	05/24/2009	Ineligible in Semester 2	Feb	Shaw, Regina	N	N	N	Y	N	
315837	03		Camacho, Rachel A	05/24/2009	Ineligible in Both Semesters	Feb	Camacho, Rachel A	N	N	N	Y	N	

- **Ineligible in Semester 1:** The student was found ineligible for semester 1, but is eligible for semester 2.
- **Ineligible in Semester 2:** The student was found ineligible for semester 2, but is eligible for semester 1.
- **Ineligible in Both Semesters:** The student was found ineligible for the full school year.

#### Notes:

There are several status in OAS indicating that a student is ineligible.

Ineligible in Semester 1 indicates that the application was ineligible in Semester 1 but is eligible for the second semester.

Ineligible in Semester 2 indicates that the application was ineligible in Semester 2 but is eligible for the first semester. For example, if a WPCP student was counted on the 3<sup>rd</sup> Friday in September and subsequently withdrew from the program, the student would be marked as Ineligible in Semester 2. This student would still be eligible for the 3<sup>rd</sup> Friday in September.

The DPI changes the status for students to Ineligible in Semester 1 and Ineligible in Semester 2, if required.

Ineligible in both semesters means the student was not eligible to participate in the Choice program for the full year. If the school has a future open application period for the program the student applied for, the student may be eligible to reapply for the program, depending on the reason they were determined ineligible.

### 8-6.14 Duplicate Students

**Duplicate Students**

- Reasons why duplicate applications may be received by the school include:
  - Two different parents may submit an application for the same student.
  - A parent may submit an application for a 5-year-old kindergarten student for two different kindergarten programs.
  - A parent may submit an application in two different open application periods for a student (MPCP and RPCP only).
- These pupils will be identified as potential duplicate pupils in the Application Summary screen if the student name and date of birth are the same.

#### Notes:

There are several reasons why multiple applications may be received by a school for the same student. The first reason is that two different parents submitted an application for the same student. Please see the Application Process Overview training for information on who may submit an application for a student.

The second reason is that a parent may submit an application for a 5-year-old kindergarten student for two different kindergarten programs. An example of when this might happen is when the school has Choice seats available in both a half-time kindergarten program and a full-time kindergarten program. A parent could select both programs when applying to the school. If the student is applying to the WPCP, the school should verify both applications as eligible, if they are. If the student is applying for the MPCP or RPCP, the school should only submit an application for the program the student will be participating in. If both applications are submitted, both will be included in the count reports.

The last reason is only applicable for MPCP or RPCP students because they have more than one open application period available. For these programs, a parent can submit an application for a student in each open application period that the school has. If the parent submits a new application in a different open application period, it will be included on a separate line in the Application Summary with the new open application period identified in the “Enroll Pd” column.

### 8-6.15 Duplicate Students (cont)

[illegible]

**Notes:**

Potential duplicate applications will be identified with an asterisk in the “Multi App” column in OAS. The applications identified will include any where there are two or more applications in “Not Yet Verified,” “Verified”, or “Submitted” status. The school can use the filters to view only the applications with an asterisk by checking the box next to “Multiple Apps \*” in the top right corner.

### 8-6.16 Duplicate Students (cont)

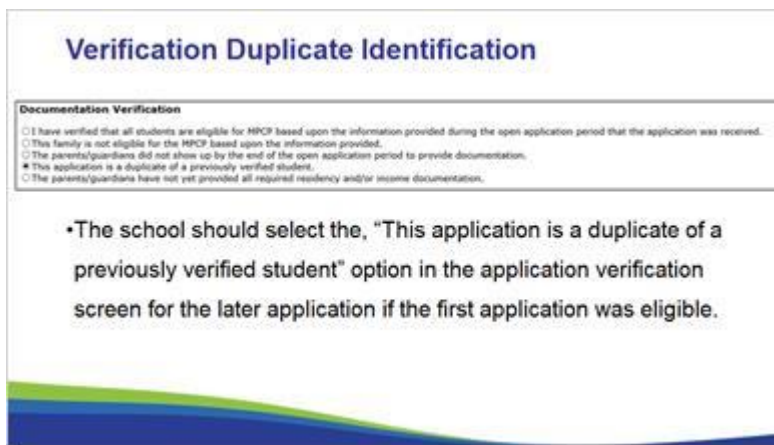
## Duplicate Students (cont)

- The school should review the applications with an asterisk in the Multi column and ensure that only one application is verified and submitted for each student.
- The exception is that WPCP applicants who applied for more than 5-year-old kindergarten program should be found as eligible for both programs if they are.

**Notes:**

The school should review the list of students to determine if any of the students are duplicates. It is possible that the applications may not be for the same student so the school will need to review each of these to determine if any are for the same student. If two of them are for the same student, the school should only verify and submit one of the applications. The only exception to this is if a WPCP student applied to two different five-year-old kindergarten programs. If the student is eligible, both WPCP applications should be verified.

### ***8-6.17 Verification Duplicate Identification***



**Verification Duplicate Identification**

**Documentation Verification**

- ☐ I have verified that all students are eligible for HPCP based upon the information provided during the open application period that the application was received.
- ☐ This family is not eligible for the HPCP based upon the information provided.
- ☐ The parents/guardians did not show up by the end of the open application period to provide documentation.
- ☒ This application is a duplicate of a previously verified student.
- ☐ The parents/guardians have not yet provided all required residency and/or income documentation.

•The school should select the, "This application is a duplicate of a previously verified student" option in the application verification screen for the later application if the first application was eligible.

**Notes:**

If the school received two applications for the same student, the verification screen for the later application will have an additional option in the verification screen. The additional option will indicate "This application is a duplicate of a previously verified student." This should be selected if the first application was eligible.



### **8-6.18 DOR Ineligible-Duplicate Application**

#### **DOR Ineligible-Duplicate Application**

- An asterisk will also be included in the Multi column if the student has a pending application and was previously determined ineligible by DOR.
- In this case, the new application must be marked ineligible since a DOR ineligibility determination results in the application being ineligible for the full school year.

#### **Notes:**

An asterisk will also show in the “Multi App” column if the student has an application in “Not Yet Verified”, “Verified,” or “Submitted” status and a different application with the same student name and date of birth was determined ineligible per DOR. If the applications are for the same student, the other application must be marked as ineligible. The DOR determination is final and the student(s) will not be able to participate in the Choice program for the entire school year at any Choice school.

### **8-6.19 Online Parent Application Changes**

#### **Online Parent Application Changes**

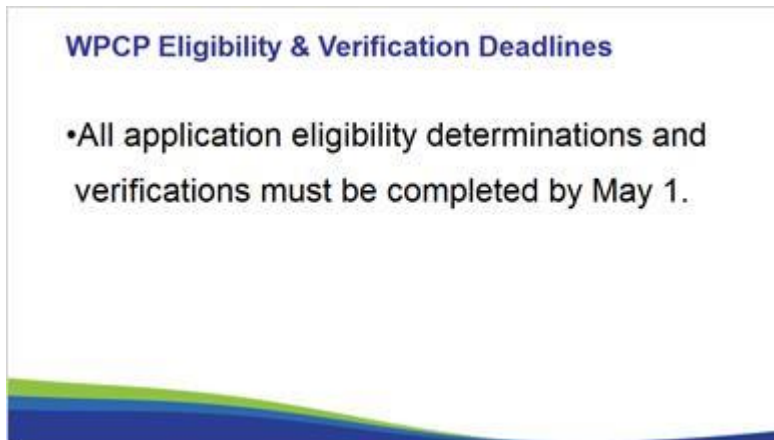
- If a parent removes your school from the online parent application in the SAME open application period, the application at your school will be removed from your Application Summary.
- If a parent RESUBMITS an application in the SAME open application period, any applications in the “Verified” status will change back to “Not Yet Verified”. Each school must determine if anything changed and reverify the application.

**Notes:**

If a parent goes into the online parent application in the same open application period and deletes your school from their selection, that application will be removed from your Application Summary.

If a parent goes into the online parent application and resubmits an application in the same open application period, the status on the application will revert to “Not Yet Verified”. The school must determine if anything changed and repeat the verification of the application in OAS.

***8-6.20 WPCP Eligibility & Verification Deadlines***



**Notes:**

All WPCP application eligibility determinations and verifications must be completed by May 1. This is extremely important as the DPI will complete the random selection based on the verified applications in OAS as of May 1.

### 8-6.21 MPCP & RPCP Eligibility & Verification Deadlines



**MPCP & RPCP Eligibility & Verification Deadlines**

- The school must determine if all applications are eligible the **earlier** of the following:
  - Prior to the next open application period
  - Within 60 days of receiving the application
  - Prior to the next count date
  - Prior to completing the random drawing (if applicable)
- The school must complete the verification in OAS within 60 days of the end of the open application period in which the application is received. After this date, the application status will change to "Expired after 60 days."

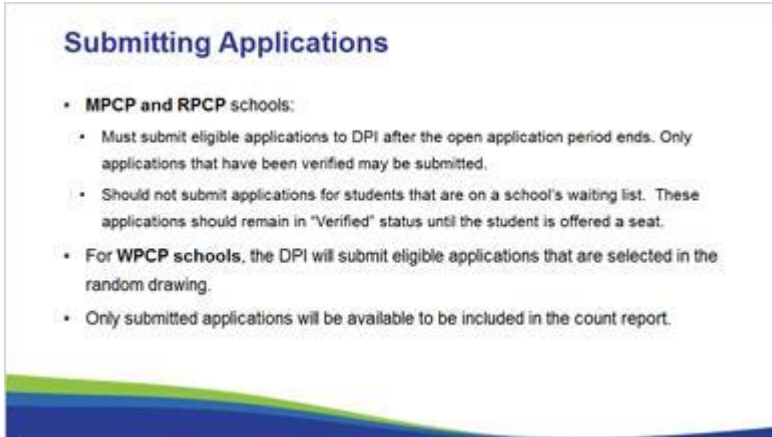
#### Notes:

This slide lists the eligibility and verification deadlines for MPCP and RPCP. The school must determine if applications are eligible the earliest of the following:

1. Prior to the next open application period
2. Within 60 days of receiving the application
3. Prior to the next count date (count dates are September 1, 3<sup>rd</sup> Friday in September and 2<sup>nd</sup> Friday in January)
4. Prior to completing the random drawing (if applicable for your school)

The OAS will automatically identify any applications that have not been verified within 60 days after the end of the open application period in which the application is received with "Expired after 60 days." For example, an application submitted during the February open application period would need to be verified within 60 days of February 20<sup>th</sup> since February 20<sup>th</sup> is the last day of the February open application period. If the school doesn't verify the application within 60 days of the end of the open application period, the application will be determined ineligible and the parent would need to resubmit a new application in a future open application period, if the school has any.

## 8-6.22 Submitting Applications



**Submitting Applications**

- **MPCP and RPCP schools:**
  - Must submit eligible applications to DPI after the open application period ends. Only applications that have been verified may be submitted.
  - Should not submit applications for students that are on a school's waiting list. These applications should remain in "Verified" status until the student is offered a seat.
- For **WPCP schools**, the DPI will submit eligible applications that are selected in the random drawing.
- Only submitted applications will be available to be included in the count report.

### Notes:

For the MPCP and RPCP, the school must submit the eligible applications to DPI after the open application period ends. An application must have been verified in OAS before the application can be submitted.

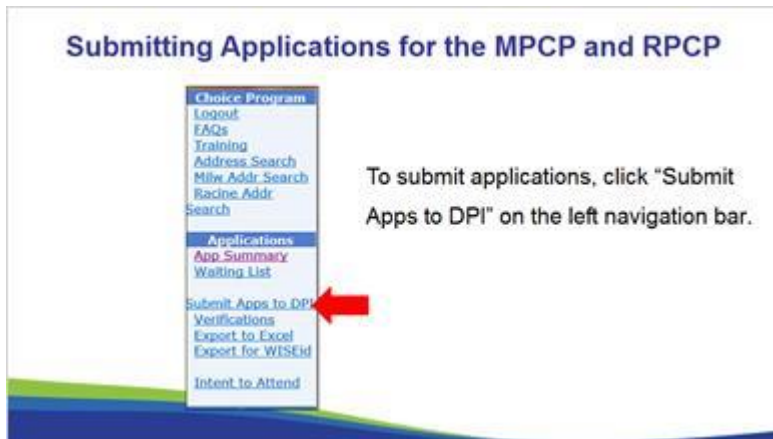
The school should not submit the applications for students that are on the school's waiting list. The waiting list applications should remain in "Verified" status until the student is offered a seat.

The DPI will submit eligible WPCP applications selected in the random drawings that DPI conducts.

Only submitted applications will be available to be included in the count report and therefore eligible for payment.

The next slides will go through the OAS process to submit an application.

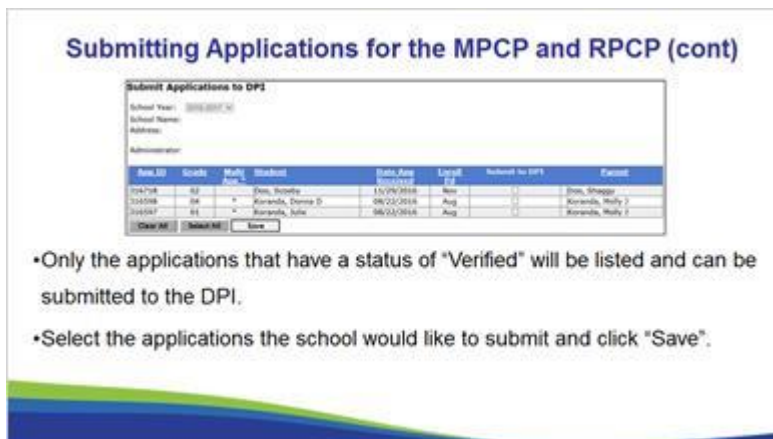
### 8-6.23 Submitting Applications for the MPCP and RPCP



#### Notes:

The school needs to log into OAS. From the navigation bar on the left of the screen, select Submit Apps to DPI.

### 8-6.24 Submitting Applications for the MPCP and RPCP (cont)



#### Notes:

The system will bring up the listing of applications that have a status of “Verified”.



Check the submit to DPI box for the applications the school would like to submit. There is a button to Select All and then you can uncheck any applications that the school does not want to submit.

### 8-6.25 Submitting Applications for the MPCP and RPCP (cont)

**Submitting Applications for the MPCP and RPCP (cont)**

App ID	Grade	Student	Date App Received	Submit to DPI	Parent
111545	02	Koranda, Andrea A	12/22/2014	<input type="checkbox"/>	Koranda, Polly J

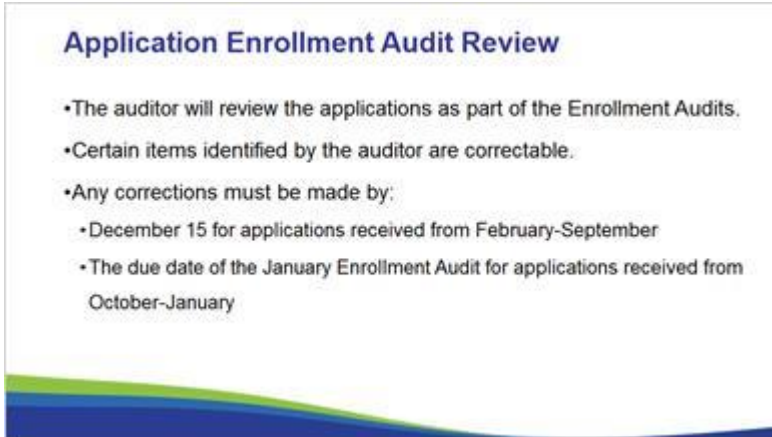
Too early to submit

- The school will not be able to submit applications until after the end of the open application period in which they are received. Before this time the "Too early to submit" message will be included.

#### Notes:

If the school tries to submit applications before the end of the open application period in which the application was received, the system will display a message that says "Too early to submit."

### **8-6.26 Application Enrollment Audit Review**



**Application Enrollment Audit Review**

- The auditor will review the applications as part of the Enrollment Audits.
- Certain items identified by the auditor are correctable.
- Any corrections must be made by:
  - December 15 for applications received from February-September
  - The due date of the January Enrollment Audit for applications received from October-January

#### **Notes:**

Your auditor will conduct two Enrollment Audits, one for the 3<sup>rd</sup> Friday in September and one for the 2<sup>nd</sup> Friday in January. The auditor will review the applications including supporting documentation as part of these audits.

All corrections identified by the auditor must be made by the due dates for the Enrollment Audits. For applications received from February - September, the due date is December 15. For applications received from October - January, the due date is May 1 for schools participating in the RPCP or WPCP and June 30 for schools only participating in the MPCP. If a school participates in the MPCP and the RPCP or WPCP, the Enrollment Audit for all programs is due on May 1.





**Notes:**

If you have any questions about the information discussed in this training, please see the Private School Choice Programs homepage. The left menu bar of the Private School Choice Programs homepage has resources for both schools and parents.

Choice schools may also contact the Choice team at [privateschoolchoice@dpi.wi.gov](mailto:privateschoolchoice@dpi.wi.gov), or call the toll-free number at 1-888-245-2732, extension 3 with questions.